



PLANVIEW PPM PRO – PRODUCT ROADMAP Q3 2022

Thanks for joining! We'll start 1 minute after the bottom of the hour.



PLANVIEW PPM PRO – PRODUCT ROADMAP Q3 2022

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Housekeeping Items

- 30-35 minutes of presentation
- Remainder Q&A
- All lines are on mute
- Enter questions into the Q&A box
 - If you can't see the chat box, click Q&A at the bottom right of the Zoom window
- Webinar is being recorded
- Recording and slides will be shared



Disclaimer

- The Roadmap represents the current state of planning, is provided for illustrative purposes only, and can be changed by Planview without notice.
- This presentation and Planview's strategy and possible future developments are subject to change and may be changed by Planview at any time for any reason without notice.
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Building the Future of Connected Work

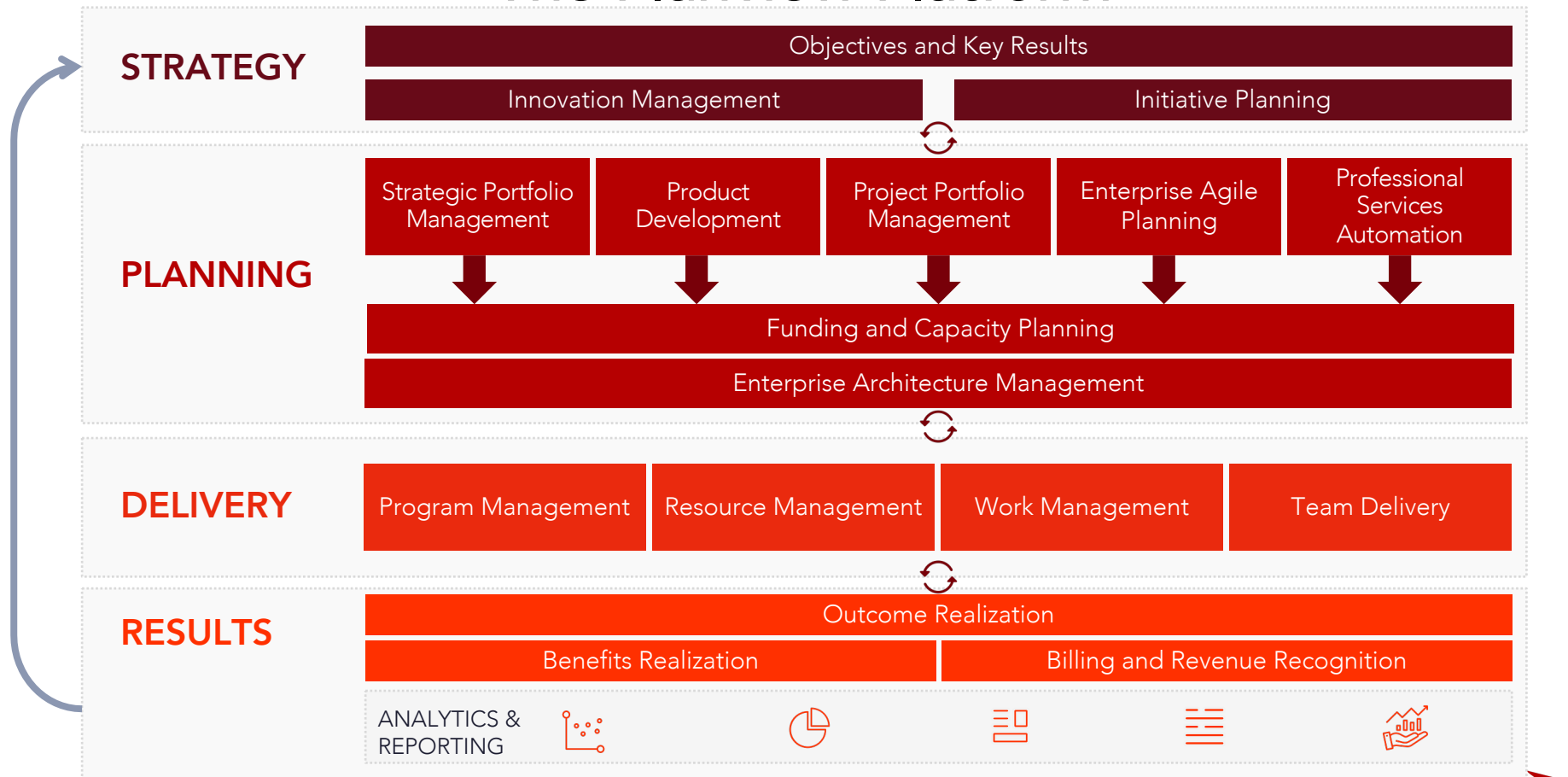


Focus on what matters most

&

Empower teams to do their best work

The Planview Platform



Q322+ Roadmap Focus

- **Projectplace Integration v2 (beta)**
- **Timesheet Summary report**
- Notification Service (Alerts 2.0)
- OData Revamp
- Reorder Project Sections*
- 1-n Additional Details Project Sections*
- Audit History report
- Rich text/image content for dashboards
- User/Group/Unit Field Restrictions*
- Dependent Field Logic
- Resource SSA
- Staffing SSA (revamp)*
- Spreadsheet Editor – SSA Entities*
- Archiving Projects*
- Push Sandbox to Production*

Projectplace v2 Integration

- WBS tasks-activities controlled from *either* solution (can toggle control)
- Cards synced but controlled from Projectplace

The image displays three screenshots of the Projectplace v2 interface, illustrating the integration between WBS tasks and cards.

Top Screenshot: Shows the 'Overview' tab for the 'MCW Project'. It features a 'Status signals' section on the left with a list of tasks (Initiation, Planning, Execution, Closing) and their durations. The main area displays a Gantt chart with task bars and their dependencies.

Bottom Screenshot: Shows the 'Tasks' tab for the 'MCW Project'. It displays a table of tasks with columns for ID, Outline, Title, Start Date, Target Date, Category, PP Type, Status, PP Activity Status, and Predecessors. The tasks are organized into a hierarchy (All Tasks, Initiation, Planning, Execution, Closing).

Right Screenshot: Shows a 'User Research' card. It includes a description, a lock date, a green status indicator, and a 'Get to work (5)' button. The card is part of a '3 - Execution' phase and is linked to a 'UX Card'.

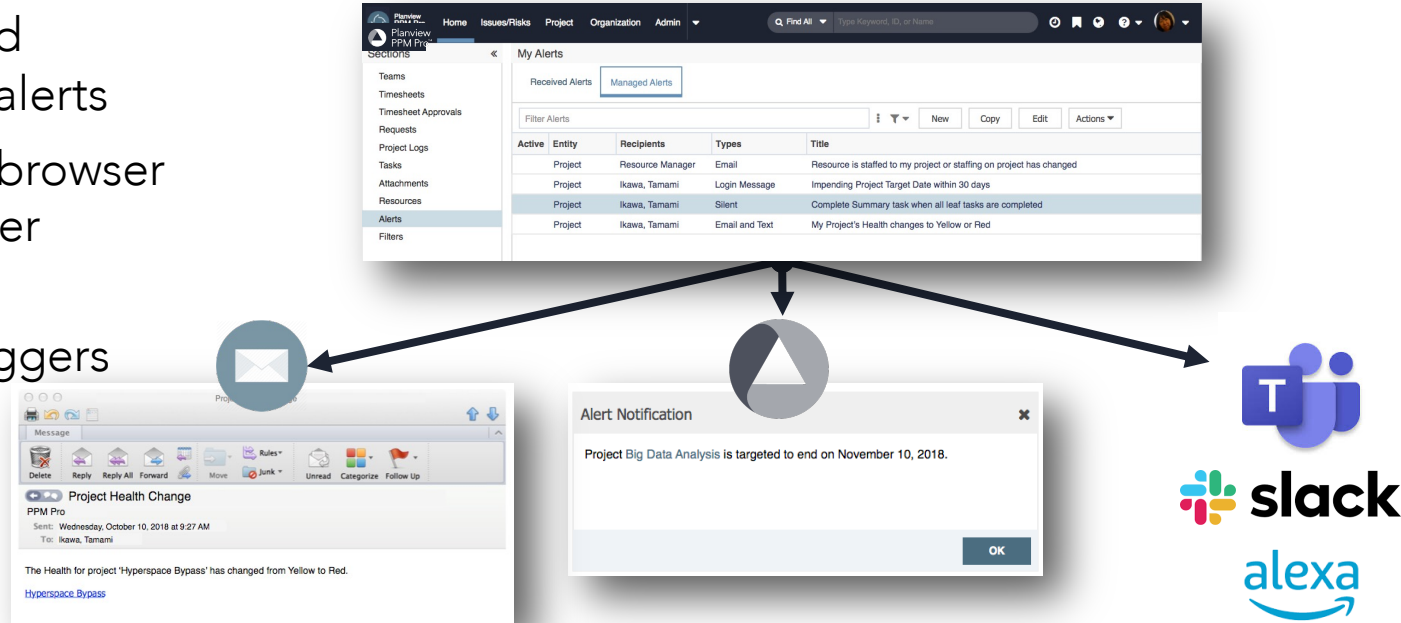
Timesheet Summary Report

Will be similar to Legacy Report

All Timesheet Entries Summarized... ▼ ✕		
Resource	Project	Total Hours
Cabrero, Filipe	CRM Implementation v3	4.00
Cabrero, Filipe	Increase Machine Inspections!	30.00
Belton, Gary	Pack and Ship Services	12.00
Christianson, Susanna	CRM Implementation v3	8.00
Kukreja, Samir	CSM Initiative	12.00
Megel, Eric	Mobile Marketplace Upgrade	88.00
Cabrero, Filipe	CSM Initiative	5.00
Cabrero, Filipe	Increase Machine Inspections!	29.00
Cabrero, Filipe	Merger - People, Process, Technology	50.00
Belton, Gary	Increase Machine Inspections!	5.00
Shaughn, Jorge	Mobile Application Project	16.00
Cabrero, Filipe	Funtastic Timeline	4.00
Cabrero, Filipe	Increase Machine Inspections!	10.00
Kukreja, Samir	Increase Machine Inspections!	0.00
Laird, Peter	WAN Project	20.00
Kukreja, Samir	Increase Machine Inspections!	20.00

Planview Platform – Notification Service

- Easier, centralized management of alerts
- Agnostic: email, browser notifications, other bots/apps
- Customizable triggers
- Advanced logic
- Alert resolution



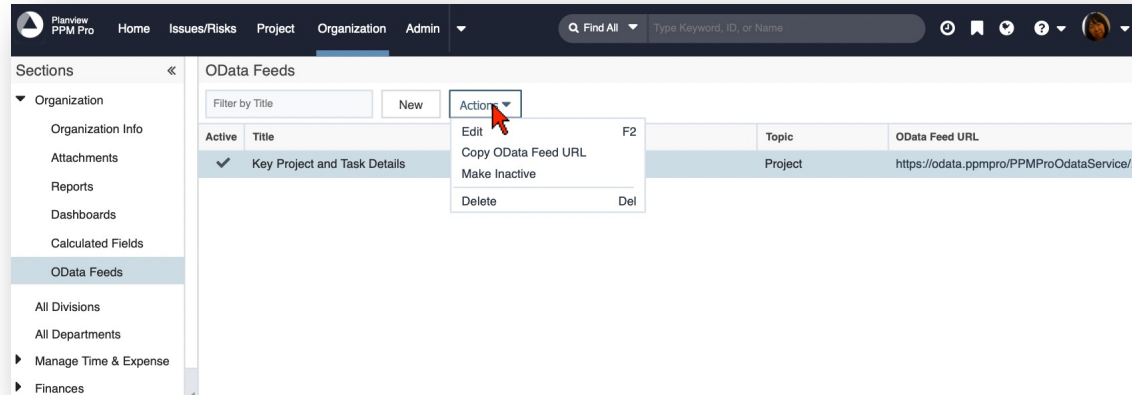
Reorder & 1-n Additional Project Sections

- Have 1-n Additional Details sections per project category
- Reorder these and other project sections per project category

The screenshot displays the Planview PM/PMO interface. The top navigation bar includes links for Home, Dashboards, New Product Development, Requests, Projects, Project Log, and Resources. A search bar is located on the right. The left sidebar lists various project sections: Gate 1, Gate 2, Gate 3, Gate 4, Gate 5, Scoring, Staffing, Tasks (43), Project Log (2), Project-Predecessors, Portfolios (2), Notes (1), Status Comments, Attachments (1), Baselines, Reports, Dashboards, Associations (0), Rollups, Team (8), Alerts, and Settings. The main content area is titled 'Agrigenomics Solutions' and shows the 'Details' section. This section is divided into two columns. The left column contains 'Basic Details' with fields for All Health Icons, ID (178315514), Title (Agrigenomics Solutions), Department (PMO), Owner (Green, Pat), Business Sponsor (Smith, Chris), Division (Enterprise), Category (Product Development), Product Type (New Market), Project Type (New Product), Priority (High), Scorecard (39.00), Priority Score (4), Competitive Advantage (Game Changer), Strategic Objective (Expand into new markets - 5% revenue incre...), Innovation Type (Breakthrough Innovation), Description (Catching up with the market on bottled cold brew), Revenue Target (\$ 15,000,000.00), Margin (\$14,975,000.00), and Objective (Create a bottled Cold Brew for Grocery chains). The right column contains 'Progress' with fields for Status (Active), Stage (Scoping), Current Gate (Gate 1), Next Gate (Gate 2), Health (Red), Scope RYG (Yellow), Resource RYG (Yellow), Cost RYG (Red), Actual Hours (524.00), % Complete (20.00%), Revenue Realized (to Date) (\$), Key Accomplishments (Completed Gate 1 Review), Next Steps (Working on Gate 2 Deliverables), ROI and NPV, WACC (10), Total Benefit (\$0.00), Total Forecasted Cost (\$218,650.00), ROI (-100.00%), Total Actual Cost (\$32,740.00), and NPV (\$0.00).

OData Revamp

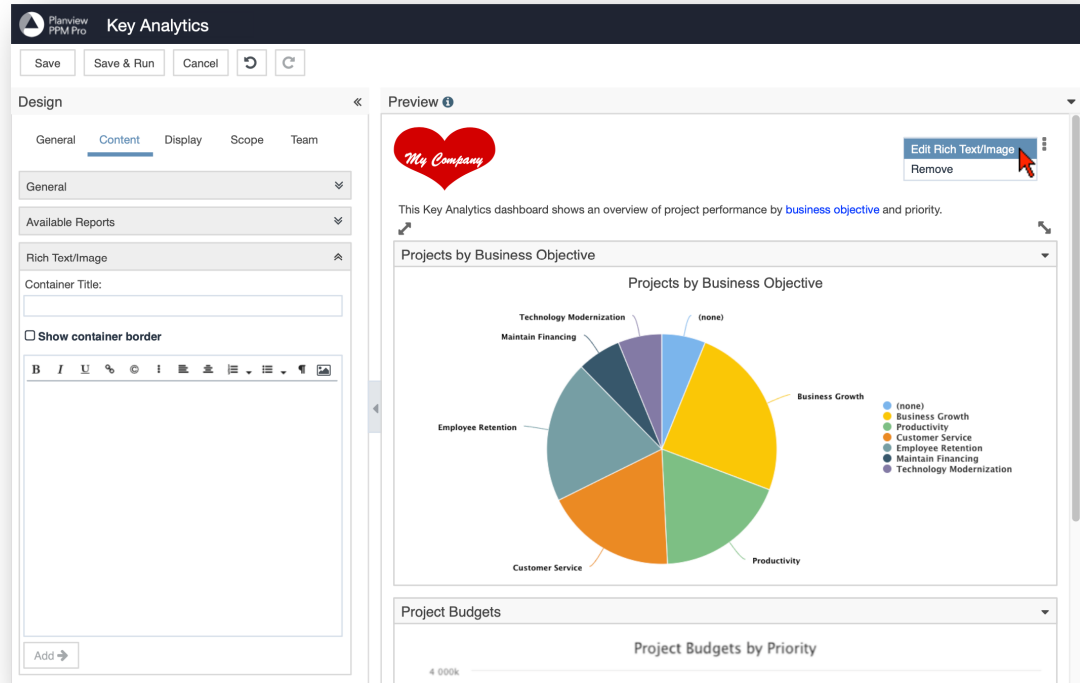
- New UI for identifying fields for OData feed
- Increase access to more than once a day/as needed
- Improve performance and data extraction size



New Dashboard Rich Text/Image Content

Include rich text and image content in multiple places of a dashboard for:

- Company logos
- Descriptive text
- Links



Audit History Report

Goes beyond Legacy report:

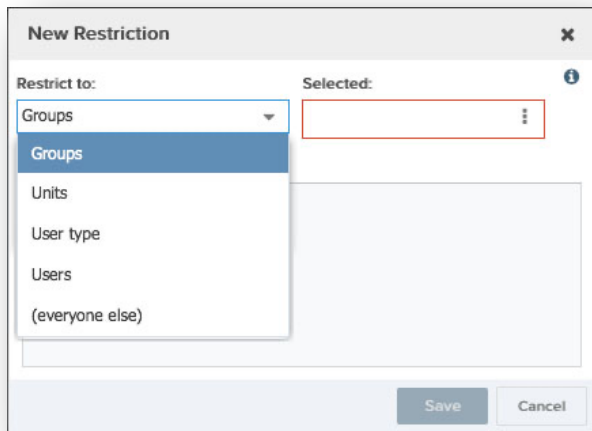
- Include “today” in results
- Increase allowed number of “Previous <n> days”
- Stretch goal: Additional Request and Staffing topics

The screenshot shows the 'New Report' interface in Planview PPM Pro, specifically the 'Variable Settings' tab. The interface includes a top bar with 'Save', 'Save & Run', 'Cancel', and refresh icons. Below the 'Design' header, there are tabs for 'General', 'Data', 'Display', 'Variable Settings', and 'Team'. The 'Variable Settings' tab is active, showing a list of 'Available Fields' on the left, including '% Complete', 'Action (Audit History)', 'Actual Hours', 'Completion Date', 'Estimated Hours', 'Field (Audit History)', 'Hours To Complete', 'ID', 'Modified By (Audit History)', 'Modified Date (Audit History)', 'New Value (Audit History)', and 'Old Value (Audit History)'. At the bottom, there is a 'List Fields (maximum 20 fields)' section with 'Move Up' and 'Move Down' buttons. A red arrow points to the 'Variable Settings' tab.

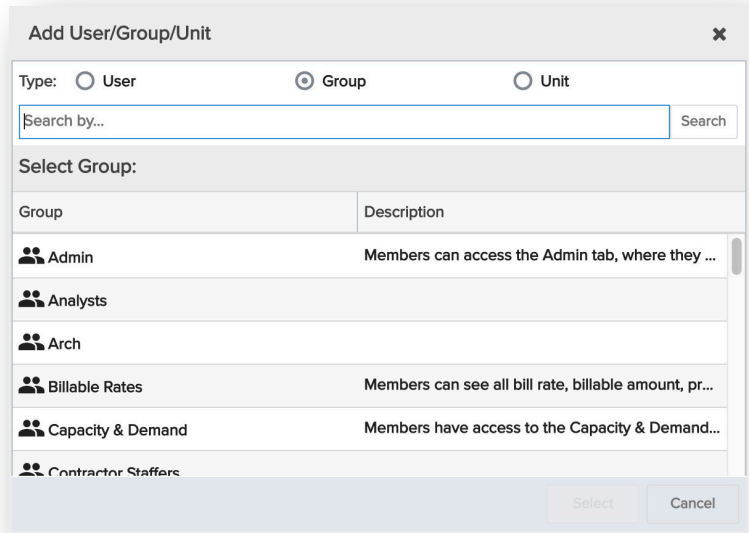
This screenshot shows the 'New Report' interface in Planview PPM Pro, specifically the 'Variable Settings' tab, focusing on the 'Audit' section. The 'Audit start date' is set to 'Current date' with a dropdown for '6 days, including today'. The 'Audit action' section has checkboxes for 'New', 'Modify', and 'Delete', with a red arrow pointing to the 'Delete' checkbox. The 'Show fields' section has radio buttons for 'All fields' and 'Specific'. The 'Modified by' section has radio buttons for 'All users' and 'Specific'. A tooltip explains that fields deleted from the entity are visible only to users with administrative privileges. At the bottom, there are checkboxes for 'Allow changing: Before running report' and 'When viewing report'.

User/Group/Unit Field Restrictions







Add Users, Groups, and Units to the “Restrict to” field



The "New Restriction" dialog box features a "Restrict to:" dropdown menu with a list of options: Groups, Units, User type, Users, and (everyone else). The "Groups" option is currently selected and highlighted. To the right of the dropdown is a "Selected:" text field, which is currently empty. At the bottom right of the dialog are "Save" and "Cancel" buttons.



The "Add User/Group/Unit" dialog box has three radio buttons for "Type": User, Group (which is selected), and Unit. Below these is a search bar labeled "Search by..." with a "Search" button. A section titled "Select Group:" contains a table of available groups.

Group	Description
 Admin	Members can access the Admin tab, where they ...
 Analysts	
 Arch	
 Billable Rates	Members can see all bill rate, billable amount, pr...
 Capacity & Demand	Members have access to the Capacity & Demand...
 Contractor Staffers	

At the bottom right of the dialog are "Select" and "Cancel" buttons.

Dependent Field Logic

Based on another field's value or other property

- Filter lookup list options
- Hide/show other fields
- Set a value on another field
- Make another field required

ID 2497013650

Title * Customer Treats

Description

Requester * Geld, Anthony

Expected Benefit

Potential Business Value

Create Date

High

Medium - High

Medium

Low - Medium

Low

Unknown

Will bring great things to the company



ID 2497013650

Title * Customer Treats

Description

Requester * Geld, Anthony

Expected Benefit

Potential Business Value High

Business Objective *

Create Date 3/15/2021

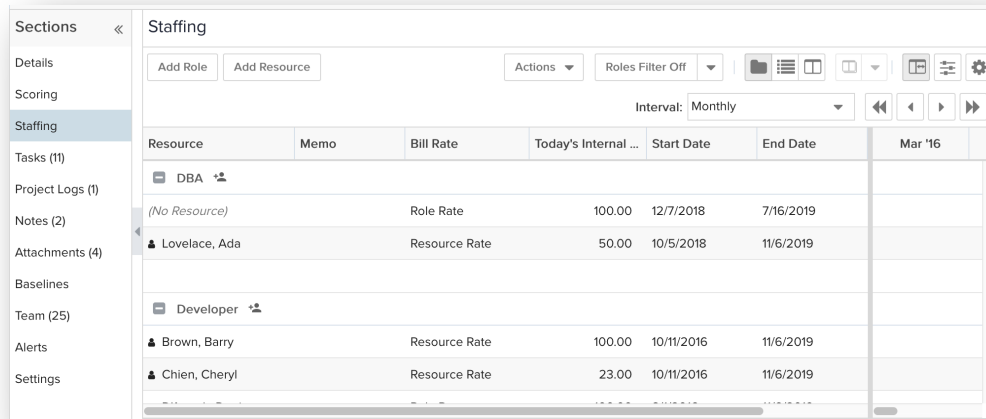
Resource SSA (Self-Service Admin)

The screenshot displays the 'People Details' configuration page in Planview PPM Pro. The top navigation bar includes 'Home', 'Resources', 'Project', 'Organization', and 'Admin'. A search bar is present with the text 'Find All' and 'Type Keyword, ID, or Name'. The left sidebar shows a tree view of sections: Organization, Permission Profiles, Users, Groups, Setup (with sub-items like Offices/Regions, Calendars, Lookups, Skills, All Entities, and People), Available Fields, Categories, Details (highlighted), Additional Details, User Details, Grid Columns, Searchable Fields, Filters, Trend Fields, Scoring, Publishing, Scheduled Jobs, Data Import, and Web Services API. The main content area is titled 'People Details' and shows a 'Category' dropdown set to 'Contractor'. It is divided into three main sections: 'Available Fields' (a list of fields like Active, Alternate for Timesheet Approval, Billing Rate, etc.), 'Details' (a list of fields like First Name, Last Name, Unit, etc.), and 'Field: First Name' (a configuration panel for the 'First Name' field). The 'Field: First Name' panel includes 'Restrictions' (Unrestricted), 'Common Properties' (Method ID: 100442, Title: First Name, Field Origin: Standard, Description: Person's first name, Field Type: String, Details Display Name), and 'Variable Properties' (Required: unchecked, Default Value, Show on New: Yes, Show on Edit: Yes - Editable).

- Admin configurable entity
- Profile-based Permissions
- Standard groups (such as Organization, Resource) converted to permission profiles

Staffing SSA (Revamp)

- Grid column config
- Explicit Group By
- Ad hoc filter
- Bulk edit
- Potentially:
 - Show actuals option
 - Resource Workbench resource utilization view option



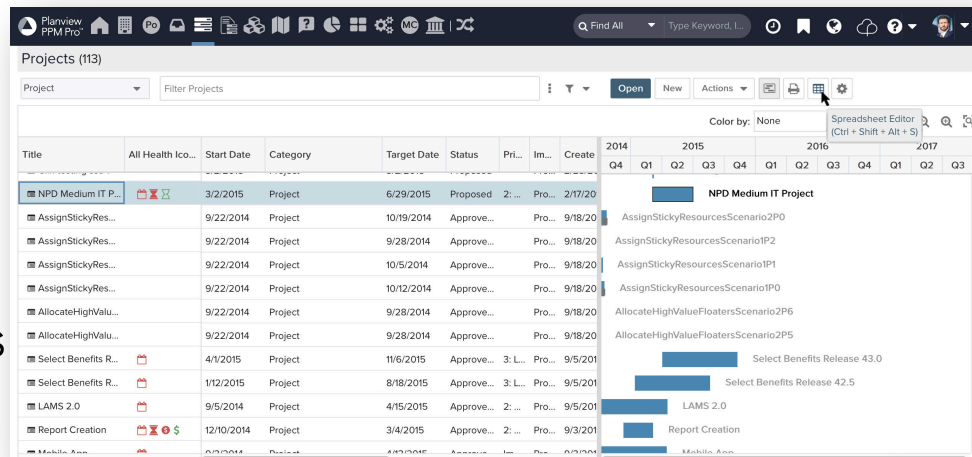
The screenshot displays the Staffing SSA (Revamp) interface. On the left, a sidebar lists sections: Sections, Details, Scoring, Staffing (selected), Tasks (11), Project Logs (1), Notes (2), Attachments (4), Baselines, Team (25), Alerts, and Settings. The main area shows a table with columns: Resource, Memo, Bill Rate, Today's Internal ..., Start Date, End Date, and Mar '16. The table is grouped by role (DBA, Developer) and shows resource utilization data.

Resource	Memo	Bill Rate	Today's Internal ...	Start Date	End Date	Mar '16
DBA						
(No Resource)		Role Rate	100.00	12/7/2018	7/16/2019	
Lovelace, Ada		Resource Rate	50.00	10/5/2018	11/6/2019	
Developer						
Brown, Barry		Resource Rate	100.00	10/11/2016	11/6/2019	
Chien, Cheryl		Resource Rate	23.00	10/11/2016	11/6/2019	

Spreadsheet Editor – SSA Entities

For remaining Self Service Admin entities (Project Logs, Projects, and so on):

- Spreadsheet-style keyboard interaction
- Undo/Redo
- Copy/paste to and from other spreadsheet tools
- Text box editing
- Does not include entity contours

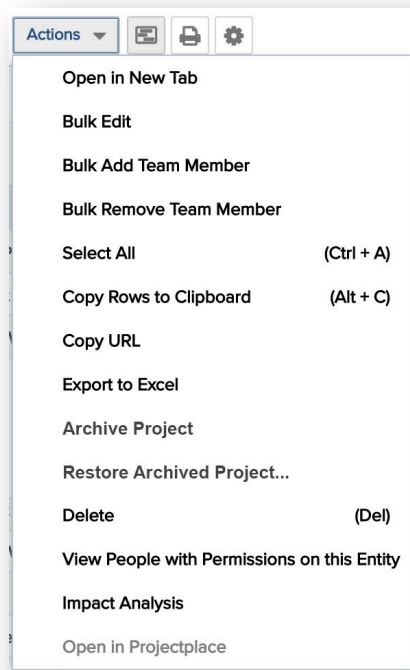


The screenshot displays the Planview PPM Pro Spreadsheet Editor interface. The main window shows a table of projects with columns for Title, All Health Icons, Start Date, Category, Target Date, Status, Pri..., Im..., and Create. The table is filtered to show 113 projects. The selected project is 'NPD Medium IT P...'. The right-hand pane shows a detailed view of the selected project, including a Gantt chart and a list of tasks. The interface includes a top toolbar with various icons and a search bar.

Title	All Health Icons	Start Date	Category	Target Date	Status	Pri...	Im...	Create
NPD Medium IT P...		3/2/2015	Project	6/29/2015	Proposed	2...	Pro...	2/17/20
AssignStickyRes...		9/22/2014	Project	10/19/2014	Approve...		Pro...	9/18/20
AssignStickyRes...		9/22/2014	Project	9/28/2014	Approve...		Pro...	9/18/20
AssignStickyRes...		9/22/2014	Project	10/5/2014	Approve...		Pro...	9/18/20
AssignStickyRes...		9/22/2014	Project	10/12/2014	Approve...		Pro...	9/18/20
AllocateHighValu...		9/22/2014	Project	9/28/2014	Approve...		Pro...	9/18/20
AllocateHighValu...		9/22/2014	Project	9/28/2014	Approve...		Pro...	9/18/20
Select Benefits R...		4/1/2015	Project	11/6/2015	Approve...	3: L...	Pro...	9/5/201
Select Benefits R...		1/12/2015	Project	8/18/2015	Approve...	3: L...	Pro...	9/5/201
LAMS 2.0		9/5/2014	Project	4/15/2015	Approve...	2: ...	Pro...	9/5/201
Report Creation		12/10/2014	Project	3/4/2015	Approve...	2: ...	Pro...	9/3/201
Mobile App		9/2/2014	Project	4/2/2015	Approve...	2: ...	Pro...	9/3/201

Archiving Projects

- “Archive Project” option:
 - Removes project and its child entities (tasks, project logs, and so on) from all views, portfolios, associations, filters, pick lists, and other general access
 - Timesheet data remains but is no longer linked to anything
 - Remaining resource demand not included in capacity/demand analyses
- “Restore Archived Project...” option
- Permissions for archiving and restoring archived projects



Push Sandbox to Production

Transfer process and structural changes from the Sandbox into Production, TBD *what* but could be:

- Reports (**Done!** Upload/Download)
- Dashboards
- Portfolios
- Request categories
- Calculated fields
- Admin items such as Permission Profiles, Lookup Lists, and others





THANK YOU

THANK YOU